

# CHAPTER 4

## PREFERENCES

### Default Recipient

#### Purpose

This menu option allows you to set a default recipient.

#### Definition

The default recipient is the person who most often receives training requests after you submit or approve them.

#### Procedure

|   |                                                                                                                                                                                                                                                 |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 | Select Default Recipient from the Preferences menu.                                                                                                                                                                                             |
| 2 | Screen displays Default Training Request Recipient.                                                                                                                                                                                             |
| 3 | Click on a name and then on Set Default. This name will automatically appear in the routing field when you submit or approve a request.<br><br><b>NOTE:</b> You can select any approving official when you submit or approve training requests. |

## Change Cost Code

### Purpose

Training coordinators supporting several cost codes must change their cost code to access reports for their secondary cost codes.

### Procedure

| Step | Action                                                                                    |
|------|-------------------------------------------------------------------------------------------|
| 1    | Select Cost Code from Preferences menu.                                                   |
| 2    | Select the desired cost code or choose All Employees after working in a single cost code. |

The screenshot shows a web application interface for a training coordinator. At the top, a header bar displays 'Training Information' on the left, and 'ADAMS, RETTA A', 'Cost Code: PD75000', and 'Requests Pending: 0' on the right. Below the header, a left sidebar contains a menu with sections: 'Actions' (Approval Inbox, View Catalog, Request Status, On-Site Request, Off-Site Request, Prioritize Request, Employee Setup), 'Preferences' (Default Recipient, Cost Code, Email Now -ON-), 'Acting' (Act As, Assign Acting, Stop Acting), 'Reports', and 'Help' (User's Manual, CTF Courses, About). The main content area is titled 'Change Cost Codes' and features a list of selectable options: 'All Employees', 'Employees in PD75000', 'Employees in PD72000', 'Employees in PD72500', 'Employees in PD72600', 'Employees in PD75200', 'Employees in PD75300', 'Employees in PD75400', and 'Employees in PD76000'. Each option is enclosed in a rectangular button-like box.

**NOTE:** Do not use this area to act as another user. Use the Act As menu option.

All Employees will show employees who have you as their Training Coordinator regardless of their cost code in all areas except Reports.

If you support several cost codes, you should change cost codes before you submit a training request.

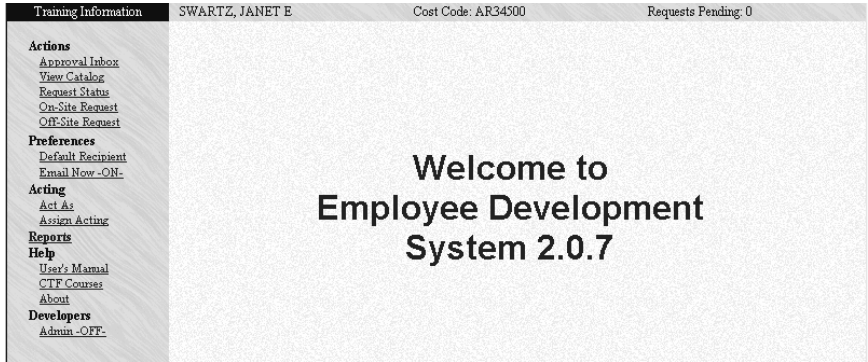

# E-mail Now

## Purpose

This section explains the e-mail notification features.

## Procedure

### Option A

| Step     | Action                                                                                                                                                                                                                                      |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1        | <p>If you set E-Mail Now—On, you receive an e-mail notification immediately when a training request enters your Approval Inbox.</p>                       |
| Option B | <p>1</p> <p>If you set E-Mail Now—Off, you will not receive an e-mail notification immediately when a training request enters your approval inbox.</p>  |

**NOTE:** With either option you receive daily e-mail notification indicating there are requests in your Approval Inbox awaiting action.

You receive an e-mail notification every day until requests leave your inbox.